

## Report Questions for Operating Programs

In five pages or less, provide responses to the report questions listed below.

- Restate each question.
- Please refer to your application when responding to these questions.
- Provide information about the most recent grant year as well as a summary of the grant so far.

### **Your Participants**

1. Describe the participants who were included in your program. How many were financially needy?

### **Your Impact**

2. What impact were you committed to achieving at the time of your application? How many of the participants achieved that impact? How do you know?
3. For any shortfalls in impact, please explain why they occurred. We encourage you to look at what you could have done differently as well as to cite external factors that may have played a role.
4. For the participants, what would have happened without you? That is, how many participants would have been likely to achieve the anticipated impact if you did not exist? How do you know?
5. Was there any additional impact you achieved for your participants or your organization beyond that originally expected in the application? If so, how do you know?

### **Your Program**

6. Describe the work of this program. That is, what did you do to achieve the anticipated impact?
7. Please indicate any significant changes in activities from what was proposed in the application.

### **Learning and Next Steps (for final reports only)**

8. Based on your experience with this program, please name up to five things you are now doing differently to increase impact.
9. What happens now? Will the program be continued? If so, at what level?



## Expenditure Report Instructions for Operating Programs

Develop an expenditure report showing the actual expenditures and income for your operating program during the most recent year of the grant period.

- The expenditure report should be done in a comparable format to the application budget.
- The expenditure report should include *budgeted* figures for each expense and income line item as well as *actual* figures for each expense and income line item.
- Indicate for which expense line items KBR funding was used. Invoices or backup documentation is not needed.
- Are there any unexpended KBR funds? If so, clearly indicate the amount.
- If any of your expense line-items would benefit from additional explanation, please provide the details at the bottom of the expenditure report.
- Your expenditure report must be signed and dated by your organization's CEO/Executive Director or other authorized individual.

The Trust adds 10% for indirect expenses to most operating grants. You do not need to include the additional 10% in your expenditure report.